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Poland

Grain and Feed

Poland Wheat Exports Increase

2002

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Report Highlights:

Poland's 2002 grain crop has been estimated at an only slightly lower level than occurred in 2001. Favorable weather resulted in increased yields and improved quality. Together with lower domestic prices, these factors are stimulating relatively large wheat exports and reduced imports. In MY 02/03, it is likely that for the first time since MY 91/92, Poland will have a positive grain trade balance.

Includes PSD changes: Yes

Includes Trade Matrix: No

Unscheduled Report

Warsaw [PL1], PL

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Production:

As reported by Poland's Main Statistical Office (GUS), total grain acreage in 2002 declined by over 5 percent with wheat area down more than 7 percent. However, based on various sources, these changes do not reflect actual reductions from year-to-year but rather, reflect the latest major agricultural census conducted in 2002, the first such census since 1996.

Regardless of significantly reduced official area figures, total grain production in 2002 is estimated at 26.8 MMT, 0.7 percent below 2001 production. Wheat production increased slightly compared to that of 2001. Improved production resulted from improved weather conditions which occurred almost throughout the entire crop season.

Corn production significantly increased with area up an estimated 33 percent and production up 32 percent. These increases continue in line with annual corn area and production increases since 1995 which annually range from 20 to 50 percent.

Trade:

Favorable weather also led to improved 2002 grain quality. As a result of higher production, quality, and plentiful stocks, domestic prices declined compared to previous years. Consequently, grain producers strongly pushed for active government interventions (close to a record 5 MMT in 2002) and exports. A number of trading companies are involved in current Polish grain trade activities according to various sources. Around 100,000 MT of MY 02/03 wheat has already been exported and another estimated 100,000 MT is ready to move from port elevators. Major destinations are the Republic of South Africa, North African countries and Malaysia. Some wheat will also be exported to the EU taking advantage of the large zero tariff quota Poland receives from the EU. EU destinations will likely be Germany, an estimated 30,000 MT from the 2002 wheat crop, and smaller quantities to Denmark, Greece and Spain. Exports would have been even higher if not for a strong Polish currency over the last few months. It is estimated that close to a half million tons of wheat will be exported in MY 02/03 making Poland a net grain exporter for the first time since MY 1991/92.

MY 2002 grain area and production figures were adjusted based on GUS estimates. MY 2002 trade has been revised based on information from a variety of industry and press sources. No change in domestic grain use is expected compared to that estimated in our previous reports. Increased stocks will result in some grain stock reduction. Small revisions were also made in the MY 2001/02 PS&Ds mainly due to revised preliminary official trade statistics.

Wheat PS&D Table

PSD Table						
Country	Poland					
Commodity	Wheat				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	2635	2635	2627	2627	2550	2435
Beginning Stocks	1400	1168	1150	1094	950	1136
Production	8503	8503	9283	9283	9300	9300
TOTAL Mkt. Yr. Imports	856	830	300	310	400	300
Jul-Jun Imports	856	830	300	310	400	300
Jul-Jun Import U.S.	0	2	0	0	0	5
TOTAL SUPPLY	10759	10501	10733	10687	10650	10736
TOTAL Mkt. Yr. Exports	5	2	150	39	100	500
Jul-Jun Exports	5	2	150	39	100	500
Feed Dom. Consumption	4300	3900	4100	3950	4100	3750
TOTAL Dom. Consumption	9604	9405	9633	9512	9650	9250
Ending Stocks	1150	1094	950	1136	900	986
TOTAL DISTRIBUTION	10759	10501	10733	10687	10650	10736

Corn PS&D Table

PSD Table						
Country	Poland					
Commodity	Corn				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	152	152	224	224	230	299
Beginning Stocks	175	275	280	285	452	472
Production	923	923	1362	1362	1300	1800
TOTAL Mkt. Yr. Imports	335	470	160	125	100	0
Oct-Sep Imports	222	470	150	125	100	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	1433	1668	1802	1772	1852	2272
TOTAL Mkt. Yr. Exports	3	3	0	0	0	0
Oct-Sep Exports	3	3	0	0	0	0
Feed Dom. Consumption	1050	1300	1250	1200	1300	1700
TOTAL Dom. Consumption	1150	1380	1350	1300	1400	1800
Ending Stocks	280	285	452	472	452	472
TOTAL DISTRIBUTION	1433	1668	1802	1772	1852	2272

Barley PS&D Table

PSD Table						
Country	Poland					
Commodity	Barley				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	1096	1096	1071	1071	1100	1069
Beginning Stocks	457	521	119	195	169	256
Production	2783	2783	3330	3330	3400	3400
TOTAL Mkt. Yr. Imports	279	291	120	131	100	100
Oct-Sep Imports	229	291	100	131	100	100
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	3519	3595	3569	3656	3669	3756
TOTAL Mkt. Yr. Exports	0	0	0	0	0	0
Oct-Sep Exports	0	0	0	0	0	0
Feed Dom. Consumption	2750	2750	2700	2700	2700	2800
TOTAL Dom. Consumption	3400	3400	3400	3400	3400	3500
Ending Stocks	119	195	169	256	269	256
TOTAL DISTRIBUTION	3519	3595	3569	3656	3669	3756

Rye PS&D Table

PSD Table						
Country	Poland					
Commodity	Rye				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	2130	2130	2002	2002	1600	1648
Beginning Stocks	375	375	169	374	357	462
Production	4003	4003	4863	4863	4000	4000
TOTAL Mkt. Yr. Imports	373	388	25	25	150	0
Oct-Sep Imports	360	388	25	25	150	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	4751	4766	5057	5262	4507	4462
TOTAL Mkt. Yr. Exports	2	2	0	0	0	0
Oct-Sep Exports	2	2	0	0	0	0
Feed Dom. Consumption	2280	2290	2300	2500	1875	2050
TOTAL Dom. Consumption	4580	4390	4700	4800	4275	4150
Ending Stocks	169	374	357	462	232	312
TOTAL DISTRIBUTION	4751	4766	5057	5262	4507	4462

Oats PS&D Table

PSD Table						
Country	Poland					
Commodity	Oats				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	566	566	531	531	600	586
Beginning Stocks	35	26	46	33	96	56
Production	1070	1070	1305	1305	1400	1400
TOTAL Mkt. Yr. Imports	16	14	0	0	0	0
Oct-Sep Imports	13	14	0	0	0	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	1121	1110	1351	1338	1496	1456
TOTAL Mkt. Yr. Exports	0	0	5	2	20	20
Oct-Sep Exports	1	0	5	2	20	20
Feed Dom. Consumption	800	790	975	1000	1130	1090
TOTAL Dom. Consumption	1075	1077	1250	1280	1405	1370
Ending Stocks	46	33	96	56	71	66
TOTAL DISTRIBUTION	1121	1110	1351	1338	1496	1456

Mixed Grain PS&D Table

PSD Table						
Country	Poland					
Commodity	Mixed Grain				(1000 HA)(1000 MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Harvested	2173	2173	2309	2309	2250	2288
Beginning Stocks	400	200	300	98	948	856
Production	4985	4985	6758	6758	6540	6800
TOTAL Mkt. Yr. Imports	0	3	0	0	0	0
Oct-Sep Imports	0	3	0	0	0	0
Oct-Sep Import U.S.	0	0	0	0	0	0
TOTAL SUPPLY	5385	5188	7058	6856	7488	7656
TOTAL Mkt. Yr. Exports	0	0	0	0	0	0
Oct-Sep Exports	0	0	0	0	0	0
Feed Dom. Consumption	4420	4460	5470	5280	5690	6250
TOTAL Dom. Consumption	5085	5090	6110	6000	6350	7000
Ending Stocks	300	98	948	856	1138	656
TOTAL DISTRIBUTION	5385	5188	7058	6856	7488	7656

NOTE: This table summarizes data for triticale and mixed grains.